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## GENERAL TAX INFORMATION CHECKLIST

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Name:

Date of Birth:

**We want to make sure you get every tax credit and deduction you're entitled to. Please use this list as a guideline for tax information you may have received.**

Mailing Address:

Phone number:

Email:

Marital Status:

SIN:

### CRA Documents & Tax Slips

2019 Notice of Assessment  
T4 Slips & Other Employment Information  
T4A slip for CERB, CRB  
T4A(OAS), T4AP, T4A, T4RSP, T4RIF  
T3, T5, T5013, T5007, T5008  
RL Slips for Quebec Residents  
Other pensions or annuities  
T4E Employment Insurance Benefits  
RRSP Contribution slips  
Foreign (eg. US Soc. Sec. UK pension)

### Other Documents

Capital Gains/Losses Documents  
(sales of stocks, bonds or real estate)  
Principle Residence Sales Report  
T2200 (Employment Expenses)  
Self-employment - Business Statement  
Rental - Income & Expenses  
Installment payments from the year

### CRA Documents & Tax Slips

Federal & Ontario Healthy Home  
Improvement Tax Credit Receipts  
Property Tax/Rent Receipts with the  
approval of payment  
Child/Spousal Support  
Childcare expenses  
Professional Fees or/Union Dues  
Tuition Paid (T2202)  
Senior Bus Passes for Ontario residents  
Interest paid on investment loan  
Carrying Charges  
Charitable/Political Receipts  
Medical Expense Receipts

- Medical Insurance Premiums (Incl. Travel Insur. Medical Portion)
- Medical Expense Receipts
- Medical Summaries from Insurance Co. (Detailed Summaries)
- Prescriptions (Detailed Summary)
- Nursing/Retirement Home Annual Statement



## **NOTES/THING YOU WANT US TO KNOW**